Vertice AI Report

Educational Breakfasts Pitch Campaign

Developed By:

Liz Karp Hauser, Jillian Ball, Sydney Fogarty, Ashlyn Utley

Developed For:
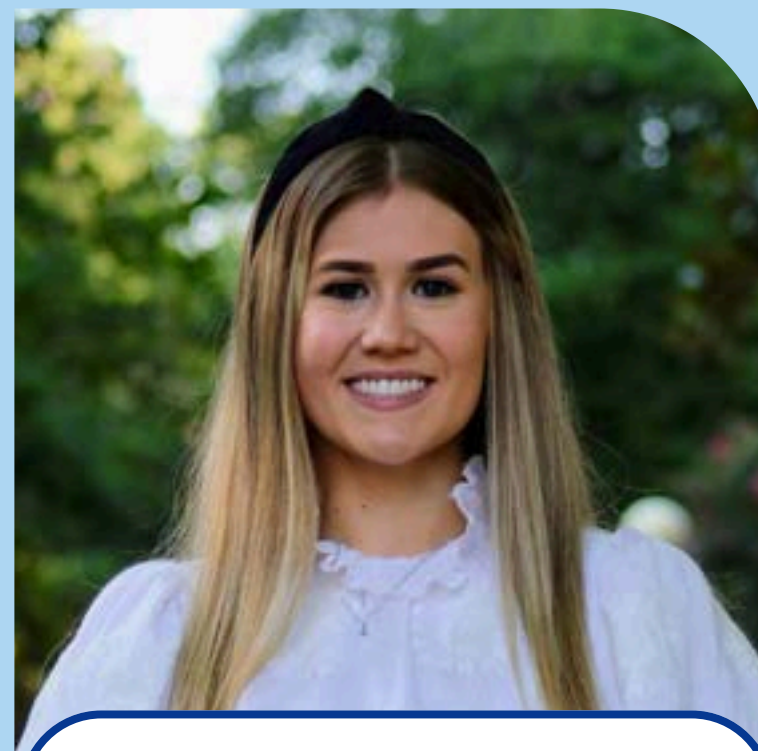
Mitch Rutledge

Introduction

Client Point-of-Contact

Liz Karp Hauser

- Brand Style Guide
- LinkedIn Post

Jillian Ball

- Retractable Banner
- Creative Brief

Ashlyn Utley

- Email/Registration Page Graphic

Sydney Fogarty

- Physical Flier Invite

For the remainder of our deliverables and this report, such as the content calendar, we all worked together to complete each weekly activity.

Client Overview

Vertice AI's technology allows them to provide credit unions with the power of a data analyst team without having to supply a physical team of a large size. Their team is rather small and they currently have 12 clients. They differentiate themselves from banks by being "for the people, by the people". Credit unions are community-oriented non-profits, unlike companies such as Bank of America where they may be more concerned with returning profit to shareholders. They use LinkedIn as the primary channel for spreading brand awareness and communicating with the c-suite marketing positions within businesses. Their mission is "know, grow, measure" and they love working together as there is little competition among credit unions.

Industry Background

- The more that marketing automation and AI grow, the more that industries such as credit unions seek this technology to simplify their operations. The credit union industry has a lot of moving pieces when it comes to generating leads, revenue, its different channels, maintaining positive client relations, etc. As the knowledge and expertise in the areas of marketing automation and AI rapidly expands, companies are branching out to reach credit unions and new companies are coming to market.

- One of Vertice AI's biggest competitors is Total Expert, another customer data platform for credit unions, bankers, lenders, and insurance companies. One thing we notice is that while Vertice AI also has a LinkedIn, it doesn't have a Facebook like Total Expert. They have 2.6k followers on that platform and are active posters, posting high-quality content including videos every few days. Their LinkedIn profile had 16k followers whereas Vertice only has 787. Another thing we notice is how Total Expert has a Google Business page with 6 5-star reviews and it doesn't seem that Vertice has a Google page or reviews at all.

The Ask

FUELING FUTURES

Vertice AI is hosting a two-day breakfast during the annual GAC Conference. This conference is the biggest event for credit unions with over 5000 people in attendance every year. This is a great marketing opportunity as many of the nation's credit union executives will already be in Washington DC for the conference. Vertice AI's breakfast event will host both current and potential clients and guests will hear testimonials from current clients to help boost positive word-of-mouth and help potential customers understand the benefit of Vertice AI.

Timeline & Deliverables

Deliverable Name	Description	Complete by
Deliverable #1: Campaign Launch Timeline	• Campaign name and style guide • "Paint-by-numbers" release plan/content calendar	10/07/2024
Deliverable #2: Registration Content	• Physical flier invites • Email invite graphics	11/04/2024
Deliverable #3: Promotional Materials	• LinkedIn Graphic • Retractable Banner Design	11/16/2024

Secondary Research

Increasing Awareness of AI Benefits

- AI can breakdown massive data sets for easy to understand results
- Gives a competitive advantage
- It can boost lending, help customers gain access to credit, and save employee time
- Vertice AI can break down the barrier of misunderstanding
- AI chatbots can increase efficiency and improve customer interactions

Exploring Philanthropic Initiatives

- A CSR initiative should stem from your company's own mission and goals to enhance brand image
- Credit Unions are all about community, so good CSR initiatives should be too
- Tech companies are already leading the pack in CSR
- The two recent hurricanes have left communities devastated and businesses have been seen to step up
- Community engagement is a rising trend in business to help foster community dependence and involvement
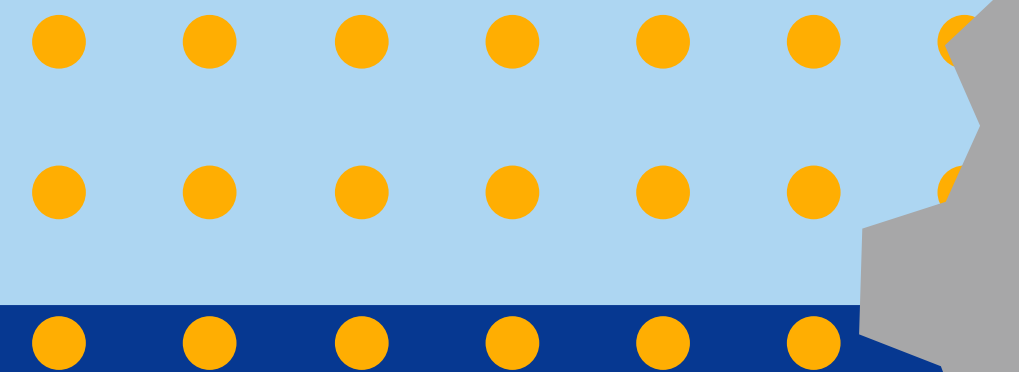
Target Market

Vertice AI specifically targets C-suite executives of credit unions, such as Chief Marketing Officers, Chief Executive Officers, the VP of Strategy, etc. They want their prospective members to know that they provide a necessary tool to help them better organize and use their customer data. Credit unions are more member-oriented than big banks. There are approximately 4800 in the U.S. and they all see each other as "members" rather than "clients." There is no competition within the credit unions, so Vertice gains lots of referrals. They are looking to share the value proposition of using Vertice's expertise to better understand their own customers and to better utilize the data they already have. Vertice wants to make it known that they are more community-oriented than profit-seeking as that is the biggest differentiation between credit unions and large banks, but isn't known by many people.
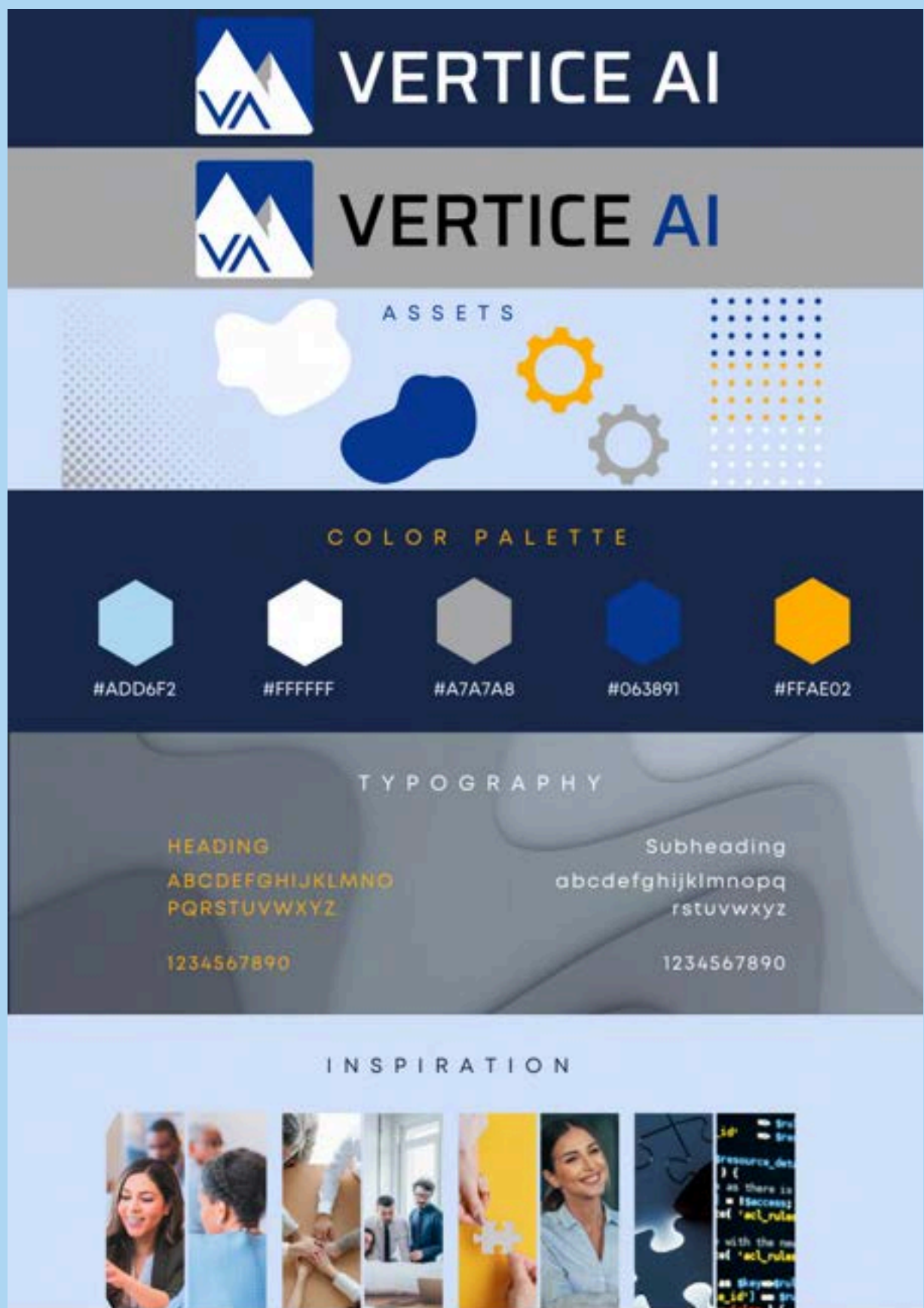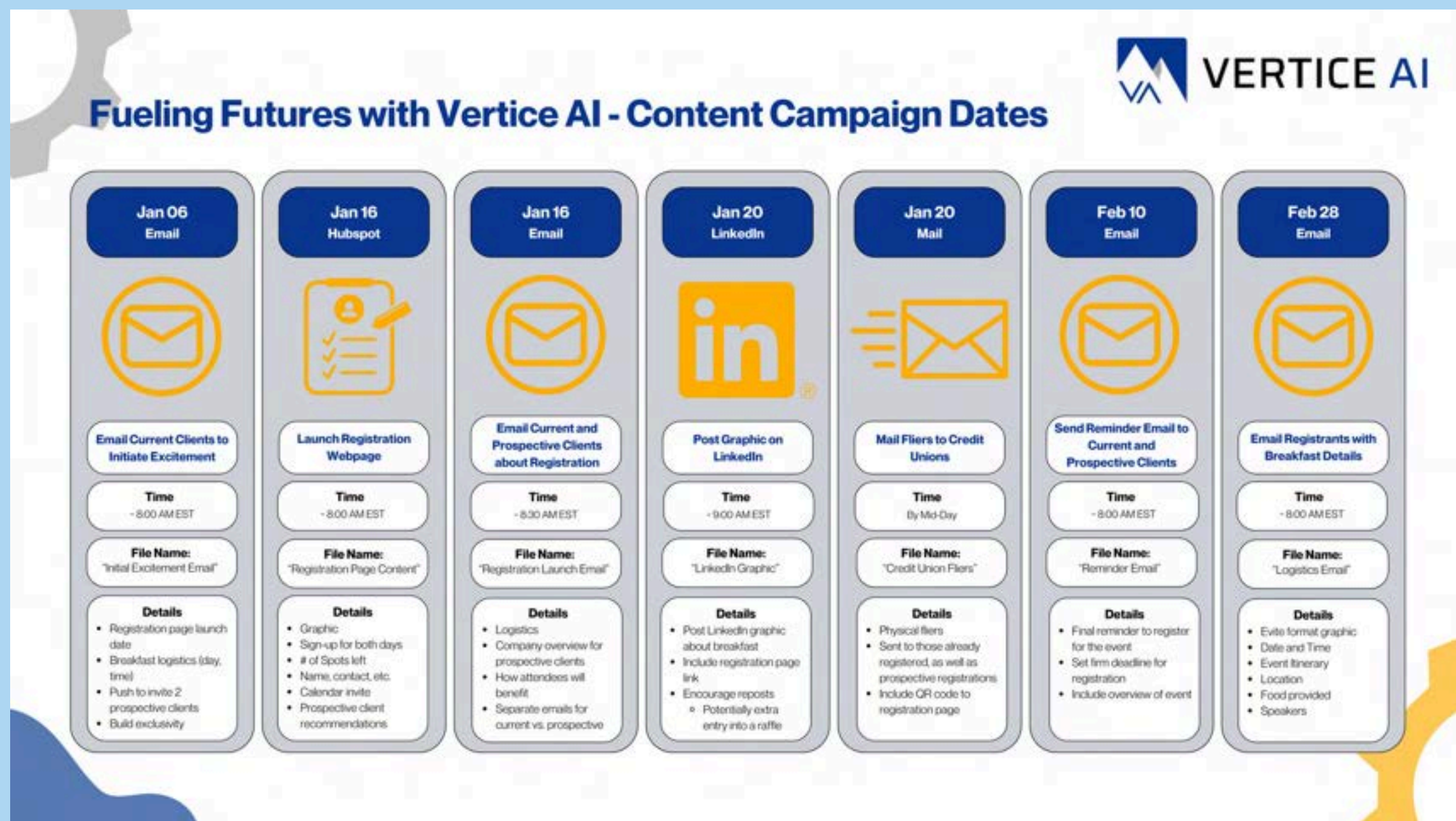
Best Practices

	Feature Posts	Reposting	Adding Media (Photos & Videos)	Utilizing Links
Escalate Group	Escalate Group features articles they have posted highlighting advancements in AI.	Escalate Group solely utilized reposting to share articles they have written or from other organizations.	Escalate Group reposted content shared by others, such as promotion of new books about the power of AI.	Escalate Group linked to articles they've written about advancements in AI and they include a call to action to share their thoughts.
Gartner	Gartner has featured posts at the top of their linkedin. They talk about Supply Chain rankings and other important information that they want people to see first.	Gartner has reposted their own posts to bring them back to the top of the feed. This is a great tactic to not repeat posts, but get their viewers to see their old posts more.	Gartner has a photo or video on every post they make. This makes the posts more interactive and interesting to the viewer.	Gartner utilizes links by linking webinars on their posts. This gives linkedin users the ability to gain more insight about Gartner on their own.
Total Expert	Total Expert does not utilize featured posts and instead lets their most recent posts show up first.	Total Expert does not utilize reposting, but posts very frequently on their own page.	Total Expert posted videos with interviews with industry veterans. Many posts that include photos to recognize star employees.	Total Expert links articles for events they are hosting or attending.

Marketing Communications Objectives for Deliverables

For this campaign, we were asked to focus on the creative details of the breakfast events. We created an event name and multiple graphics that will be used throughout the course of the campaign, leading up to the day of the breakfast. This will allow our client to focus on the actual content and logistics of the event, with the help of these tools as a guide and reference.

Deliverable #1

Fueling Futures with Vertice AI - Content Campaign Dates

VERTICE AI

Jan 06 Email	Jan 16 Hubspot	Jan 16 Email	Jan 20 LinkedIn	Jan 20 Mail	Feb 10 Email	Feb 28 Email
Email Current Clients to Initiate Excitement	**Launch Registration Webpage**	**Email Current and Prospective Clients about Registration**	**Post Graphic on LinkedIn**	**Mail Fliers to Credit Unions**	**Send Reminder Email to Current and Prospective Clients**	**Email Registrants with Breakfast Details**
Time ~8:00 AM EST	**Time** ~8:00 AM EST	**Time** ~8:30 AM EST	**Time** ~9:00 AM EST	**Time** By Mid-Day	**Time** ~8:00 AM EST	**Time** ~8:00 AM EST
File Name: "Initial Excitement Email"	**File Name:** "Registration Page Content"	**File Name:** "Registration Launch Email"	**File Name:** "LinkedIn Graphic"	**File Name:** "Credit Union Fliers"	**File Name:** "Reminder Email"	**File Name:** "Logistics Email"
Details • Registration page launch date • Breakfast logistics (day, time) • Push to invite 2 prospective clients • Build exclusivity	**Details** • Graphic • Sign-up for both days • # of Spots left • Name, contact, etc. • Calendar invite • Prospective client recommendations	**Details** • Logistics • Company overview for prospective clients • How attendees will benefit • Separate emails for current vs. prospective	**Details** • Post LinkedIn graphic about breakfast • Include registration page link • Encourage reposts ○ Potentially extra entry into a raffle	**Details** • Physical fliers • Sent to those already registered, as well as prospective registrations • Include QR code to registration page	**Details** • Final reminder to register for the event • Set firm deadline for registration • Include overview of event	**Details** • Evite format graphic • Date and Time • Event itinerary • Location • Food provided • Speakers

VERTICE AI

ASSETS

COLOR PALETTE

| #ADD6F2 | #FFFFFF | #A7A7A8 | #063891 | #FFAE02 |

TYPOGRAPHY

HEADING
ABCDEFGHIJKLMNO
PQRSTUVWXYZ
1234567890

Subheading
abcdefghijklmnopq
rstuvwxyz
1234567890

INSPIRATION

Deliverable #2

Can print for as low as $1.64 from VistaPrint

Fueling Futures with Vertice AI

Vertice AI would like to cordially invite you to a breakfast event to fuel your day.

When: March 3, 2025 at 7:30am
Where: Founding Farmers and Distillers

We look forward to seeing you!

Scan to RSVP

VERTICE AI

Fueling Futures
with **VERTICE AI**

Event Info
Join us for a delicious breakfast and to hear from your peers about AI-powered member growth. Take this chance to learn more about Vertice AI's approach for personalized member engagement.

Speakers: wellby, Community Financial CREDIT UNION, vizo financial

Date and Time
March 3, 2025 at 7:00am

FOUNDING FARMERS

Location
Founding Farmers & Distillers
600 Massachusetts Ave NW,
Washington, DC 20001

RSVP
link to registration

Deliverable #3

Set dimensions of 33"x81"

Recommend printing via VistaPrint for $149

The Ideal Impact

- ➕ 5-10 new credit union members
- ➕ Minimum $50k ROI
- ➕ Goal of $1M in ROI

Creative Brief

CREATIVE BRIEF

PROJECT NAME: Fueling Futures with Vertice AI
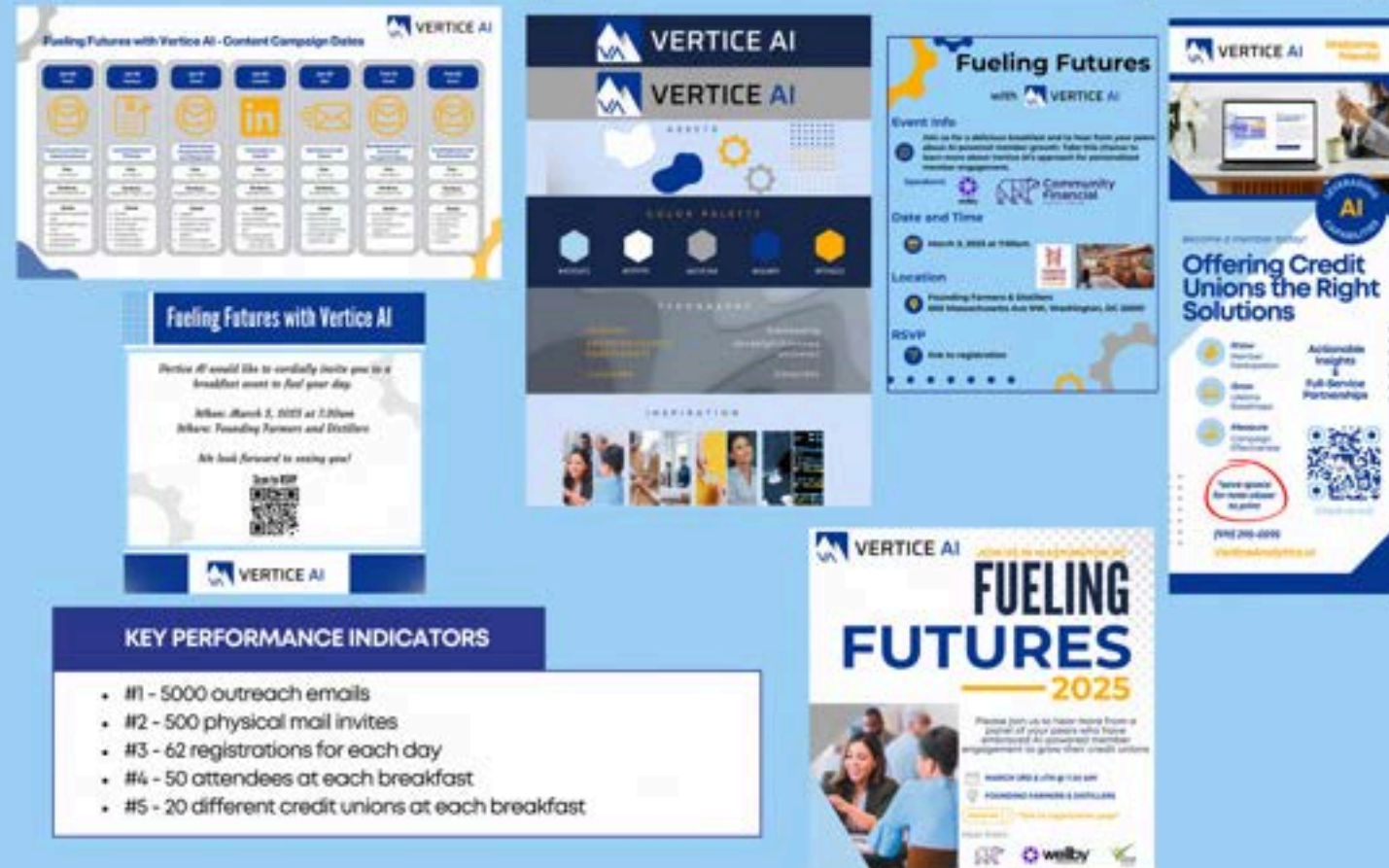
PROJECT GROUP: Liz Karp Hauser, Jillian Ball, Ashlyn Utley, Sydney Fogarty

PROJECT OVERVIEW

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KEY PERFORMANCE INDICATORS

- #1 - 5000 outreach emails
- #2 - 500 physical mail invites
- #3 - 62 registrations for each day
- #4 - 50 attendees at each breakfast
- #5 - 20 different credit unions at each breakfast

Key Performance Indicators

Outreach email to over 5000 people

Physical invites to select 500

Registration 62 people each day

50 people at each breakfast, at least 20 credit unions at each.

Expect 80% of people you invite to show up. So by inviting 62, you will likely get 50 that show up.

Each level of this marketing funnel is a key performance indicator. These numbers must be hit at each step of the registration process in order to ensure maximum attendance to the breakfast events.

Main measure of success is that all 50 people show up to each of the breakfasts.

Additionally, how many new clients Vertice AI acquires directly from interaction at the breakfast.

General Recommendations

- Develop a stronger online presence on LinkedIn
- Use employee-generated content to enhance the community feel of the company
- Utilize LinkedIn to post educational content to help break the barrier of misunderstanding around AI

Class Recommendations

- Create a series of LinkedIn posts highlighting the employees/company culture
- Infographics on LinkedIn to show the impact Vertice AI has had on past clients
- Educational content about AI
- Customer testimonials on LinkedIn
- More tabling spots at credit union events
- Monthly blog posts about on industry insights and AI's impact
- Organizing a Zoom webinar to spread awareness and educate those on the fence
- Implement a referral program

To Summarize...

Vertice AI came to us with a need for help in developing their breakfast events. They wanted to bring together both current clients and prospective ones, in hope of spreading the work of their company to more credit unions around the country.

We worked with Mitch this semester to develop deliverables that would make the planning and execution processes much smoother come 2025.

We created a style guide and event branding, then used this to further create a content calendar, physical and email invites, LinkedIn post, and retractable banner for the company to utilize.

Annotated Bibliography

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